

Taxpayer Access Point (TAP) File Upload (FLE) Instructions

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TAP FILE UPLOAD OVERVIEW

The Montana Department of Revenue has implemented the new TAP File Upload (FLE) online service for W-2s, 1099s and MW-3 Annual Reconciliation reporting

Employers can submit employee's W-2 and 1099 files, as well as the MW-3 Annual Reconciliation. Payroll service providers or professional preparers and third party representatives can submit files on behalf of clients, with a single login.

The TAP File Upload (FLE) online service can be used with most payroll software products.

- W-2 files must be submitted in **text (.txt) format only** and must meet Social Security Administration Publication No. 42-007 (EFW2) requirements.
You can verify your W-2 file format at:
<http://www.socialsecurity.gov/employer/accuwage/index.html>.
- 1099 files must be submitted in **text (.txt) format only** and must meet IRS publication 1220 format specifications. You can verify your 1099 file format at: <https://fire.test.irs.gov>.
- MW-3 files must be filed using MT DOR approved software and are required to be in a Zip format.
Vendor software testing for the MW-3 is currently in progress.

TAP FILE UPLOAD REGISTRATION

Register for a TAP File Upload (FLE) Account by following these steps:

1. Go to the [TAP](#) homepage
2. Select the *NEW* File Upload link
3. Enter the required information and select **Submit**

Note: If you have a TAP account, the email address you provide in the FLE registration form must be the exact email provided when the original TAP account was created.

Within 5-10 minutes you will receive an authorization code and a temporary password from DoNotReply.TAP@mt.gov to login to your account. You will be required to change your password and update your profile information immediately upon logging in.

UPLOAD AND SUBMIT FILES

❖ **After creating a File Upload (FLE) Account, upload W-2s or 1099s by following these steps:**

1. Login to your TAP account
2. Select the blue **Account ID** link ending with FLE from your Home page
3. Select **Submit New File**
4. Select a file to submit: **W-2 File** or **1099 File**
5. Select **Browse**
6. Enter a description of the file you are submitting

7. Select **Choose File** and navigate to the file you would like to upload then select **Open**
(A progress bar will be shown as TAP performs an initial verification of the file type and format)
8. Select **Save** (the file will appear in the Attachments section in the left toolbar)
9. Select **Submit** (you will be required to enter your TAP password to complete the submission)

Upload and submit an MW-3 file with one of the two following options:

❖ Submit several MW-3 files using File Upload

(Software Vendor testing is in progress for the MW-3 Upload option. Check back soon for a list of approved software)

Once you have verified that your software vendor is approved, follow these steps to submit your file:

1. Login to your TAP account
2. Select **Account ID** from your Home Page
3. Select **Submit New File**
4. Select the **MW-3 File** button
5. Select the tax year that the return is for
6. Select **Browse**
7. Enter a description
8. Select **Choose File** and navigate to the file you would like to upload
9. Select **Open**, **Save** and **Submit**

• Submit a single MW-3 using your TAP withholding account

1. Login to your TAP account
2. Select **Account ID** from your Home Page
3. Select **File Now** next to the period you wish to file
4. Complete fields 1-3 and verify all payments in the lower table are correct
5. Select **Submit**

FREQUENTLY ASKED QUESTIONS

I registered for a File Upload (FLE) account. Where is my authorization code and temporary password?

The authorization code and temporary password will be emailed from DoNotReply.TAP@mt.gov. Some internet providers and spam filters may stop certain emails. Ensure you set the filters to allow email from DoNotReply.TAP@mt.gov. If you are unable to locate the email, please [contact us](#) for further assistance.

Do I need to enter my authorization code each time I log in to TAP?

No, you only need the authorization code the first time you login or if you use the Forgot my Password feature.

Can I submit an MW-3 and a W-2/1099 file at the same time?

No, each file type must be submitted separately to avoid submission errors and rejected files.

How do I troubleshoot file submission errors?

- Be sure to update your software regularly. This assures that if known errors have been found and corrected, your files will not be rejected for those errors.

- If you are not given the option to select a specific file type:
 1. Select Home from the menu bar
 2. Select the Account ID
 3. Be sure the File Upload tab is selected
 4. Select Add/Remove Access of File Formats to add the file type you need to submit
- If the above tips do not help when you attempt to add a file for submission, follow these steps:
 1. Verify that the file format is a text (.txt) file and you have selected the correct file type i.e.; W-2 vs 1099.
 2. Montana requires the RS record (State Withholding amount) in the W-2 file submissions.

NOTE: If you have contacted your software vendor with an upload issue or experienced another problem, please complete the TAP File Upload survey at <http://revenue.mt.gov/home/taphelp/surveys> so we can work with software vendors and improve the File Upload (FLE) service.

Where do I find a previously submitted file?

1. Login to your TAP account
2. From your Home Page, select the Account ID
3. Select Requests
4. If you do not see previously submitted files, select Change Date, and enter an earlier date

I have multiple tax accounts. Can I access all of them in TAP?

- Yes. You can add access to any tax account that is included in the TAP system

How do I make a payment using TAP?

If you have a tax account in TAP you can make payments within your account by following these steps:

1. Log into your TAP account
2. Select Account ID from your Home Page
3. On the left side of the screen select Make a Payment
4. Select the Period for which you are making a payment
5. Select the Payment Type (E-Check or Credit/Debit card) you are making
6. Enter the personal and banking information as required
7. Submit your payment

MT DEPARTMENT OF REVENUE CONTACT INFORMATION

Contact our **Citizen Services Call Center** for assistance with your individual, nonresident or business tax questions, Monday through Friday, 8 am to 5 pm (Mountain Time)

In Helena	406-444-6900
Outside of Helena	1-866-859-2254
Telephone Device for the Deaf-TDD	406-444-2830
After hours/weekends:	Citizen Services Email